

Reciprocity Procedures when applying Reciprocity Salaries

When a member has requested that we use their Reciprocal Salaries in their retirement estimate the following steps must be taken:

- First you must research to find if Full Reciprocity, other system, or final compensation exchange does apply to the member. In order for a member to have full reciprocity or a final compensation exchange or reciprocal salaries used when calculating their retirement benefit they must have transferred employment between agencies within required timeframes*. Other situations when final compensation can apply with out a transfer within 6 months are other system (STRS, JRS, and LRS).

*On 10-1-57, the break in membership from one retirement system to the other was limited to 60 days.

Effective 10-1-59, it was changed to 90 days.

On 1-1-76, discontinuance of membership in the first system and employment that lead to membership in the other system must be within six months.

- Research of COMET can determine if you may apply the reciprocal salaries to the members estimate. Under Activity in the Account Tab you will be able to find information on the member regarding reciprocity.

Here is a list of TYPES of Reciprocity you may find in COMET and what the mean:

Full: Member has full reciprocity with CalPERS and the reciprocal retirement system as they met the movement criteria to establish reciprocity, use highest salaries if member retires on same day with both systems.

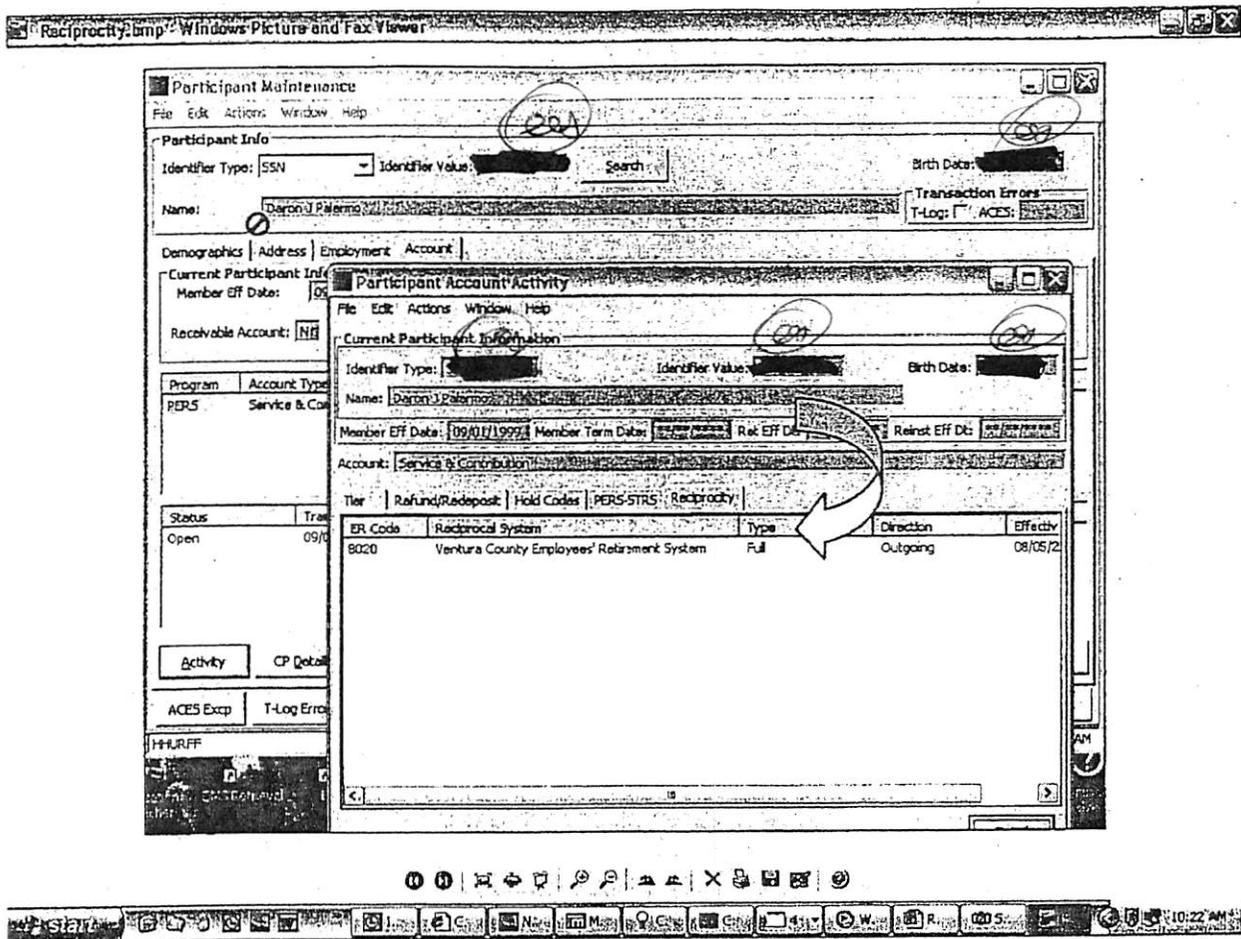
Final Comp: The member has final compensation exchange; they have made the move within the required guidelines prior to the reciprocal contract agreement date, use highest salaries if member retires on same day with both systems.

Also, if they are a member of UCRP and did not meet the movement criteria, they will be afforded final compensation exchange recognized in CalPERS. Member will need to discuss with UCRP their eligibility for reciprocity and final compensation exchange.

Vesting Only: The member qualifies to retire; however, CalPERS salaries are used. CalPERS considers you vested with or without establishing reciprocity as long as you are a member of a reciprocal retirement system because normally a member will have 5.000 years accumulated under all retirement systems. Member may also be retired from the other retirement system; however, final compensation exchange will not apply.

Other System: Member of CalSTRS, LRS, JRS, and JRS II (gentleman's handshake agreement, no formal reciprocal agreement/contract established) Statutes provide for the exchange of final compensation.

Not Appl: Not a member of the reciprocal retirement system so there is no reciprocity to establish.



- Look for what TYPE of Reciprocity has been established.

If the member advises of reciprocal salaries/reciprocity, and/or status reads Inactive Reciprocity, a determination needs to be made that the use of final compensation and/or reciprocity is valid. The status of Inactive Reciprocity does not constitute a member qualifying for reciprocity.

- If there is no reciprocity information on COMET for a member who has noted Reciprocal salaries on their estimate, reciprocity has not been determined **only** use CALPERS salaries when completing the estimate. Send Not-Reciprocal template with estimate located under the MBSD templates for estimates.
- If member has established FULL reciprocity and has not given other system payrates on estimate request send Reciprocity template located under the MBSD templates for estimates.

Please refer all questions or concerns to the estimate unit supervisor to be addressed or assigned to an analyst.